

Job Aid: Create a Quote in COMMBUYS

This Job Aid shows how to:

- Create a quote in response to a bid in COMMBUYS

Of Special Note:

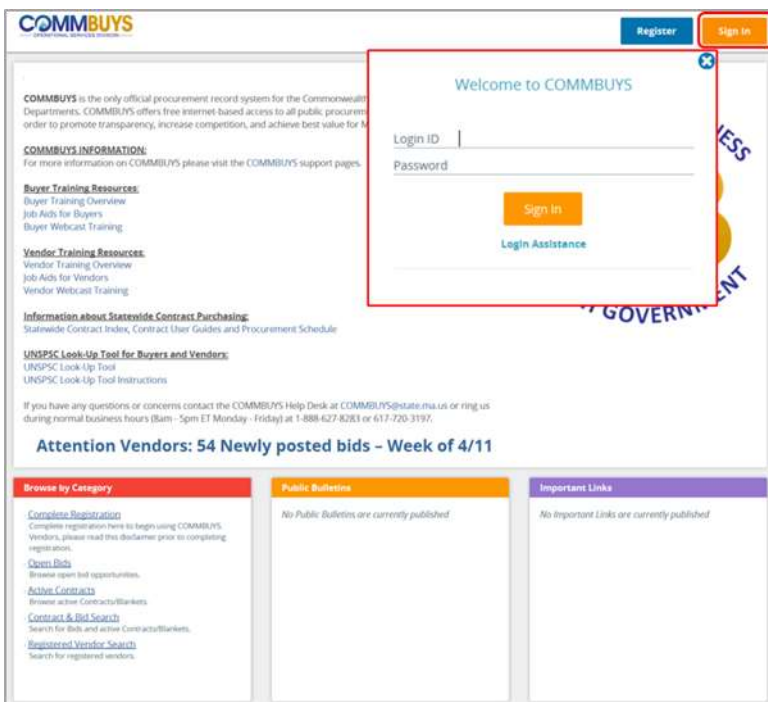
It is the vendor's responsibility to read the bid and any attachments (including the Request for Response) in its entirety prior to creating and submitting a quote.

OSD recommends you create a bid specific folder that is easily accessible with any completed documents or forms that must accompany the quote. Be sure to follow any file upload instructions provided by the buyer (e.g. naming convention, file description, or file size).

Only users with Seller privileges can create a quote in COMMBUYS. These instructions assume the logged in user has Seller credentials.

Screenshot

Directions



The screenshot shows the COMMBUYS website. At the top right are 'Register' and 'Sign In' buttons. A red box highlights a 'Welcome to COMMBUYS' login overlay. Inside this box are fields for 'Login ID' and 'Password', a 'Sign In' button, and a 'Login Assistance' link. The background of the website shows various links for buyers and vendors, including 'Buyer Training Resources', 'Vendor Training Resources', and 'Information about Statewide Contract Purchasing'. At the bottom, there are sections for 'Browse by Category', 'Public Bulletins', and 'Important Links'.

Step 1: Launching COMMBUYS

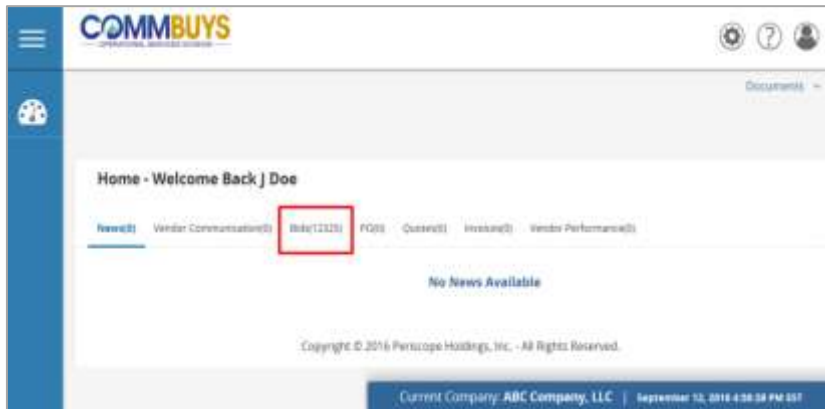
1. Enter the uniform resource locator (URL) address for COMMBUYS (<https://www.commbuys.com>) or (commbuys.com) in your browser.
2. Once the COMMBUYS landing page displays click on the **Sign In** button.
3. Enter your **Login ID** and **Password** and sign in to COMMBUYS.

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Create a Quote in COMMBUYS

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Step 2: Accessing Bids

1. From the Homepage click on the **Bids** tab to view bids that have been sent to your company.

Home - Welcome Back J Doe

News(0) Vendor Communications(1) **Bids(2447)** Quotes(0) Invoicing(0) Vendor Performance(0)

Request For Revision

Quote #	Organization	Bid #	Bid Opening Date	Date Last Modified
QT-1089-03D07-03D07-1566-93	Operational Services Division	BD-17-1089-03D07-03D07-8393	09/15/2016 11:47:15 AM	09/15/2016 11:42:55 AM

Bids / Bid Amendments (Un-Acknowledged)

Bid #	Organization	Alternate Id	Buyer	Description	Bid Opening Date	Bid Holder
BD-17-1080-03D07-03D07-8489	Operational Services Division		Regina Kinney	Landscape & Green Roof Products, Playground Equipment	09/21/2016 12:00:00 AM	List
BD-17-1080-03D07-03D07-8488	Operational Services Division		Regina Kinney	RFP for Tarp Help	09/15/2016 11:47:15 AM	List

Open Bids

Bid #	Organization	Alternate Id	Buyer	Description	Bid Opening Date	Bid Q & A	Create Quote /View Auction	Bid Holder
BD-17-1080-03D07-03D07-8489	Operational Services Division		Regina Kinney	Print, Copy & Mail Services, and Printed Promotional Products	09/28/2016 12:00:00 AM	View	Create Quote	List
BD-17-1080-03D07-03D07-8484	Operational Services Division		Regina Kinney	Foodservice Supplies and Equipment, Institutional Commercial Grade	10/28/2016 12:00:00 AM	View	Create Quote	

Open/Rolling Enrollment Bids

Bid #	Organization	Alternate Id	Buyer	Description	Bid Opening Date	Bid Q & A	Create Quote /View Auction	Bid Holder
BD-17-1080-1080C-1080C-8483	Operational Services Division		Samuel Lee	Servest	09/26/2016 10:30:00 AM	View	Create Quote	
BD-17-1080-03D07-03D07-8410	Operational Services Division		Shirley Eric	PHS-CA-Open_Rolling-4081	09/15/2017 12:00:00 AM	View	Create Quote	

Step 3: Opening Bids

1. Click on the hyperlinked **Bid #** to open and review a bid in the **Bids/Bid Amendments (Un-Acknowledged), Open Bids, or Open/Rolling Enrollment Bids** sections.

Acknowledge Receipt and View Solicitation

Bid # BD-17-1080-OSD07-OSD07-8455
Bid Description Print, Copy & Mail Services, and Printed Promotional Products

Click Yes to acknowledge the download of the bid. When you acknowledge a bid, you may receive any future correspondence regarding this document. If you do not want to acknowledge click No, and the bid will be displayed. Do you want to continue?

Yes

No

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Step 4: Acknowledging Receipt of Bids

1. Click the **Yes** button to acknowledge and access the bid.

Note: In this acknowledgement you agree to receive any future correspondence regarding this bid.

If you select **No** you may still view the bid but will not receive any notifications regarding updates or amendments.

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Screenshot

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Bid Solicitation: BD-17-1080-OSD07-OSD07-8455

Header Information

Bid Number: BD-17-1080-OSD07-OSD07-8455	Description: Print, Copy & Mail Services, and Printed Promotional Products	Bid Opening Date: 09/28/2018 12:00:00 AM
Purchaser: Regina Remy	Organization: Operational Services Division	
Department: OSD07 - OSD TRAINING	Location: OSD07 - OSD TRAINING	
Fiscal Year: 17	Type Code: SW - Statewide Solicitation	Allow Electronic Quote: Yes
Alternate Id:	Required Date:	Available Date: 09/23/2018 10:54:06 AM
Info Contact:	Bid Type: OPEN	Informal Bid Flag: No
Purchase Method: Open Market	Rolling Enrollment Enabled: <input type="checkbox"/>	Open Enrollment Enabled: <input type="checkbox"/>

Pre Bid Conference:

Bulletin Desc:

Ship-to Address: OSD Training 1 Amburton Place Suite 1017 Boston, MA 02108 US Email: rex@percoperholdings.com Phone: (12)3456-7890	Bill-to Address: Accounts Payable 1 Amburton Place Suite 1017 Boston, MA 02108 US Email: rex@percoperholdings.com Phone: (12)3456-7890	Print Format: Bid Print
-------------------------------------------------------------------------------------------------------------------------------------------------------------	-----------------------------------------------------------------------------------------------------------------------------------------------------------------	--------------------------------

File Attachments: Standard Contract Form
Request for Response (RFR)
Business Reference Form

Form Attachments:
SBPP (Small Business Purchasing Program) No
Eligible?

Item Information

Item # 1: (82-12 - 15) Printing Services

UNSPSC Code: 82-12-15
Printing

Qty	Unit Cost	UOM	Total Discount Amt	Tax Rate	Tax Amount	Total Cost
15		EA - Each				
Manufacturer:		Brand:		Model:		
		Packaging:				

Print Page Create Quote Bid Q & A Exit

Step 5: Reviewing Bids

- Review the following information displayed on the bid's Summary tab:
 - Bid Number:** COMMBUYS-generated document number.
 - Description:** the information displayed in this section varies by the buyer. It could be the agency's internal bid number, a brief description of the bid, or keywords that describe the goods or services being procured.
 - Bid Opening Date:** date the bid is opened for evaluation. This is also the date the bid closes to quote submission by vendors.
 - Purchaser:** contact person and/or the creator of the bid.
 - Organization, Department, Location:** agency information.
 - Type Code:** will either be **SW** (for Statewide bids) or **NS** (for Non-Statewide/Departmental bids).
 - Allow Electronic Quote:** should always be **Yes**. This allows vendors to submit their quote response through COMMBUYS.
 - Required Date:** date agency requires the goods or services being procured. Follow up with bid contact.
 - Available Date:** date bid was posted on COMMBUYS.
 - Info Contact:** contact person for the bid.
 - Bid Type:** will either be **Open** (any vendor can respond) or **Closed** (only selected vendors can respond).
 - Informal Bid Flag:** will either be **Yes** (buyer can see quotes before the Bid Opening Date) or **No** (buyer cannot see quotes before the Bid Opening Date).
 - Purchase Method:** will either be **Open Market** (one time bid) or **Blanket** (contract).
 - Pre-Bid Conference Details**
 - Ship-to and Bill-to Addresses**
 - File Attachments:** bid forms and documents uploaded by the agency. Be sure to read all attachments and complete/submit forms/documents as instructed.
 - Item Information:** item description, UNSPSC code, and other criteria entered by the buyer.

Job Aid:

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Screenshot

Directions

Item Information

Item # 1: (82-12 - 15) Printing Services

UNSPSC Code: 82-12-15
Printing

Qty	Unit Cost	UCMF	Total Discount Amt	Tax Rate	Tax Amount	Total Cost
12		24 - Each				
Manufacturer:			Brand:		Model:	
Make:			Packaging:			

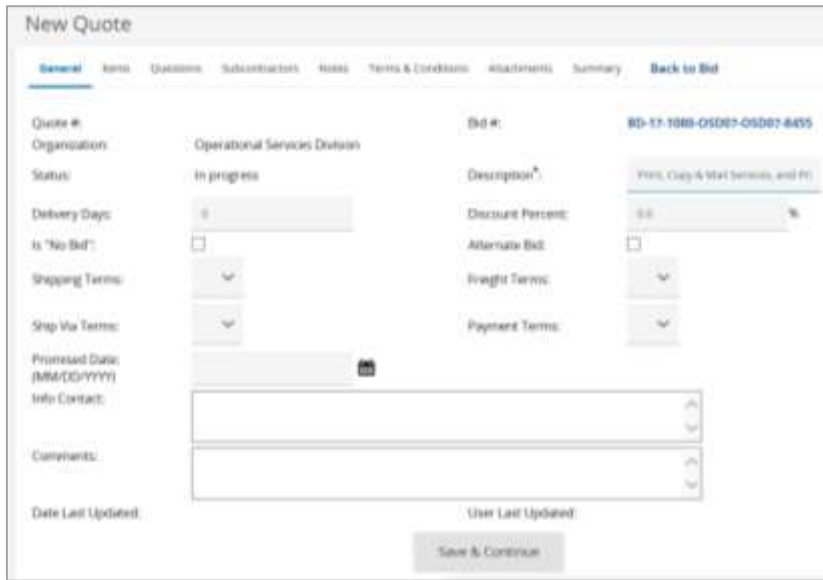
Step 6: Creating Quotes

1. Click the **Create Quote** button at the bottom of the **Bid Summary** page to open the **New Quote** page.

Job Aid:

Create a Quote in COMMBUYS

Screenshot



Directions

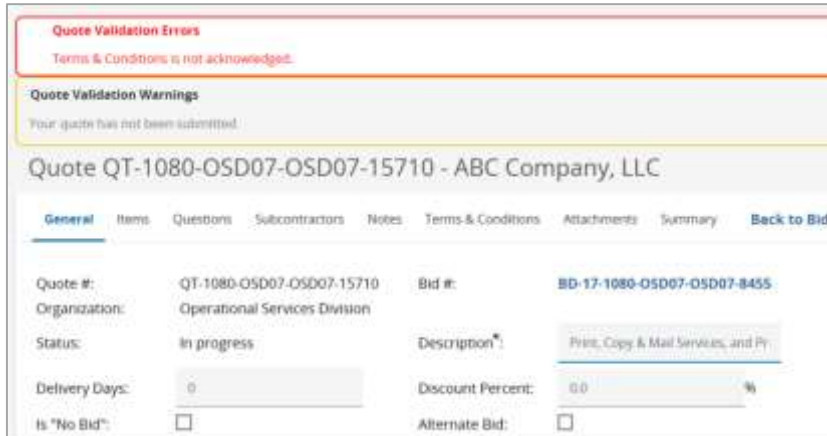
Step 7: Entering General Quote Information

- The General Tab is populated with some information from the bid. All fields on this page are options with the exception of the **Description**. Fields available to update include:
 - Description:** Defaults to the description of the bid. This can be edited.
 - Delivery Days:** Days to deliver goods or services upon successful awarding of bid/purchase order.
 - Discount Percent:** If entered, will automatically be applied to all items on quote. This can be done on an item by item basis on the item tab.
 - Is "No Bid":** Checkmark to formally declare that you will not be submitting a quote for this bid.
 - Alternate Bid:** Checkmark to formally flag a quote as an alternate bid if this is the second quote for the vendor (if allowed by the buyer).
 - Shipping Terms:** Defaults from the vendor profile.
 - Freight Term:** Defaults from the vendor profile.
 - Ship Via Terms:** Defaults from the vendor profile.
 - Payment Terms:** Defaults from the vendor profile.
 - Promised Date:** Date to deliver items to the buyer.
 - Info Contact:** Contact information for questions regarding quote. This field is limited to 400 characters.
 - Comments:** Field to enter in notes to the buyer. This field is limited to 400 characters.
- Click the **Save & Continue** button to save your updates and generate a **Quote Number**.

Job Aid:

Create a Quote in COMMBUYS

Screenshot



Quote Validation Errors
Terms & Conditions is not acknowledged.

Quote Validation Warnings
Your quote has not been submitted.

Quote QT-1080-OSD07-OSD07-15710 - ABC Company, LLC

General Items Questions Subcontractors Notes Terms & Conditions Attachments Summary [Back to Bid](#)

Quote #: QT-1080-OSD07-OSD07-15710 Bid #: **BD-17-1080-OSD07-OSD07-8455**

Organization: Operational Services Division

Status: In progress Description: [Print, Copy & Mail Services, and Pr...](#)

Delivery Days: 0 Discount Percent: 0.0 %

Is "No Bid": ☐ Alternate Bid: ☐

Directions

Step 8: Reviewing System Messages

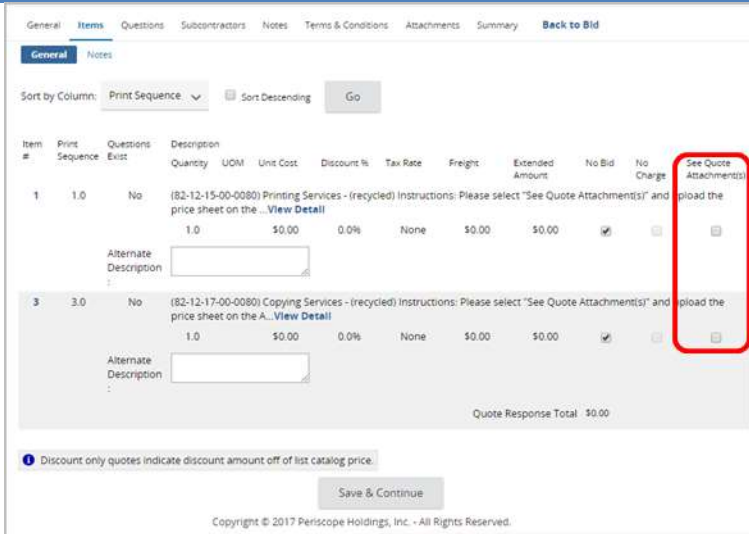
- Once you click **Save & Continue** the page will refresh itself and display two system messages and a **Quote Number**.
- The following messages will be displayed:
 - A red error message that reads: **Terms and Conditions is not acknowledged**. To resolve this, click on the **Terms & Conditions** tab to accept the terms.
 - A yellow warning that reads: **Your quote has not been submitted**. There is no further action required to resolve this. This is an informational message.
- Click on the **Items** tab to continue creating your quote.

Job Aid:

Create a Quote in COMMBUYS

Screenshot

Directions



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General Notes

Sort by Column: Print Sequence Sort Descending Go

Item #	Print Sequence	Questions Exist	Description	Quantity	UOM	Unit Cost	Discount %	Tax Rate	Freight	Extended Amount	No Bid	No Charge	See Quote Attachment(s)
1	1.0	No	(82-12-15-00-0080) Printing Services - (recycled) Instructions: Please select "See Quote Attachment(s)" and upload the price sheet on the A...View Detail	1.0		\$0.00	0.0%	None	\$0.00	\$0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3	3.0	No	(82-12-17-00-0080) Copying Services - (recycled) Instructions: Please select "See Quote Attachment(s)" and upload the price sheet on the A...View Detail	1.0		\$0.00	0.0%	None	\$0.00	\$0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Alternate Description:

Quote Response Total \$0.00

Discount only quotes indicate discount amount off of list catalog price.

Save & Continue

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Step 9: Attaching Price Sheet or Entering Unit Cost

- (a) Attach a price sheet:

Select the **"See Quote Attachment(s)"** box for the goods or services you wish to bid on. This enables you to upload the price sheet on the Attachments tab.

OR

- (b) Enter the Unit Cost:

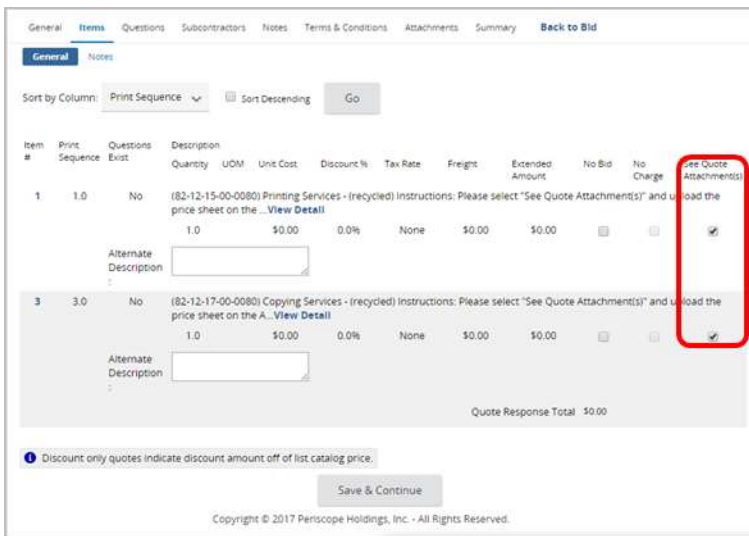
Input your quote information (e.g. Unit Cost, Discount, Freight) for the goods or services you wish to bid on.

- To view additional details about an item, click on the blue hyperlinked **Item #**.
- Once all information has been completed on the **Items** tab click **Save & Continue**.
- Click on the **Terms & Conditions** tab.

Note: By default the **No Bid** box will be checked off. When the **"See Quote Attachment(s)"** option is activated; the **No Charge** and **Unit Cost** selections are inactive and the price details must be uploaded on the Attachments tab.

If the **"See Quote Attachment(s)"** option is not activated you can enter a **Unit Cost** or select the **No Charge** box.

By leaving a checkmark in the **No Bid** box you are indicating that you are not submitting a quote for the item.



General Items Questions Subcontractors Notes Terms & Conditions Attachments Summary Back to Bid

General Notes

Sort by Column: Print Sequence Sort Descending Go

Item #	Print Sequence	Questions Exist	Description	Quantity	UOM	Unit Cost	Discount %	Tax Rate	Freight	Extended Amount	No Bid	No Charge	See Quote Attachment(s)
1	1.0	No	(82-12-15-00-0080) Printing Services - (recycled) Instructions: Please select "See Quote Attachment(s)" and upload the price sheet on the A...View Detail	1.0		\$0.00	0.0%	None	\$0.00	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3	3.0	No	(82-12-17-00-0080) Copying Services - (recycled) Instructions: Please select "See Quote Attachment(s)" and upload the price sheet on the A...View Detail	1.0		\$0.00	0.0%	None	\$0.00	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

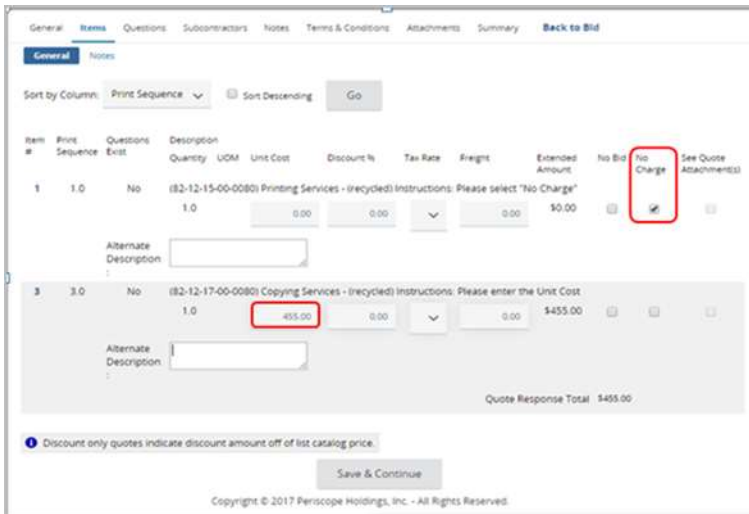
Alternate Description:

Quote Response Total \$0.00

Discount only quotes indicate discount amount off of list catalog price.

Save & Continue

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General Items Questions Subcontractors Notes Terms & Conditions Attachments Summary Back to Bid

General Notes

Sort by Column: Print Sequence Sort Descending Go

Item #	Print Sequence	Questions Exist	Description	Quantity	UOM	Unit Cost	Discount %	Tax Rate	Freight	Extended Amount	No Bid	No Charge	See Quote Attachment(s)
1	1.0	No	(82-12-15-00-0080) Printing Services - (recycled) Instructions: Please select "No Charge"	1.0		0.00	0.00		0.00	\$0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3	3.0	No	(82-12-17-00-0080) Copying Services - (recycled) Instructions: Please enter the Unit Cost	1.0		455.00	0.00		0.00	\$455.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Alternate Description:

Quote Response Total \$455.00

Discount only quotes indicate discount amount off of list catalog price.

Save & Continue

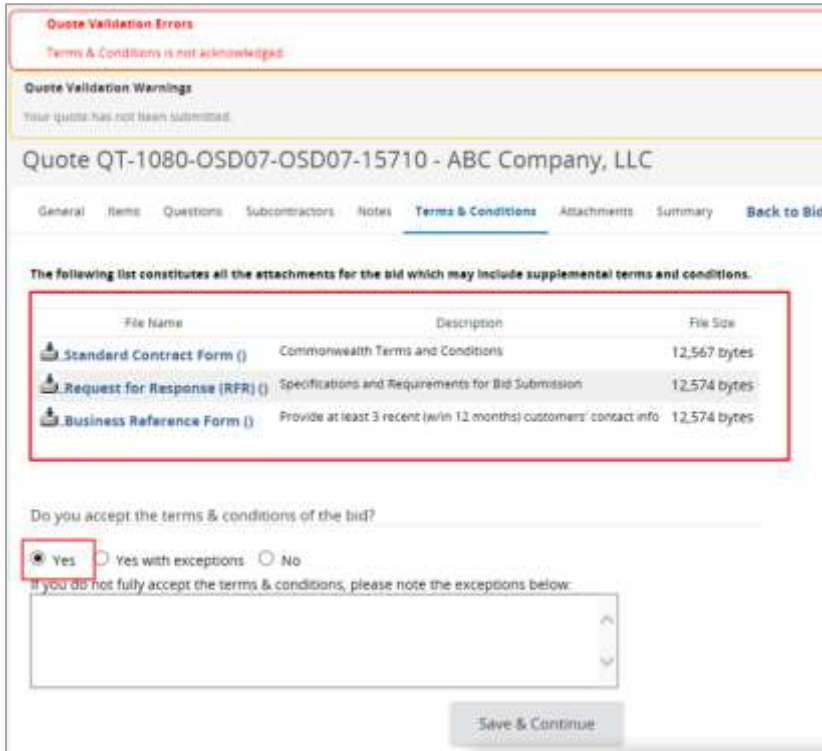
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Job Aid:

Create a Quote in COMMBUYS

Screenshot

Directions



Quote Validation Errors
Terms & Conditions is not acknowledged.

Quote Validation Warnings
Your quote has not been submitted.

Quote QT-1080-OSD07-OSD07-15710 - ABC Company, LLC

General Items Questions Subcontractors Notes **Terms & Conditions** Attachments Summary [Back to Bid](#)

The following list constitutes all the attachments for the bid which may include supplemental terms and conditions.

File Name	Description	File Size
Standard Contract Form ()	Commonwealth Terms and Conditions	12,567 bytes
Request for Response (RFR) ()	Specifications and Requirements for Bid Submission	12,574 bytes
Business Reference Form ()	Provide at least 3 recent (w/in 12 months) customers' contact info	12,574 bytes

Do you accept the terms & conditions of the bid?

☒ Yes
 ☐ Yes with exceptions
 ☐ No

If you do not fully accept the terms & conditions, please note the exceptions below:

[Save & Continue](#)

Step 10: Accepting Terms & Conditions

1. Click the radio button next to **Yes** to accept the Terms & Conditions.
2. Click **Save & Continue**.
3. Click on the **Attachments** tab.

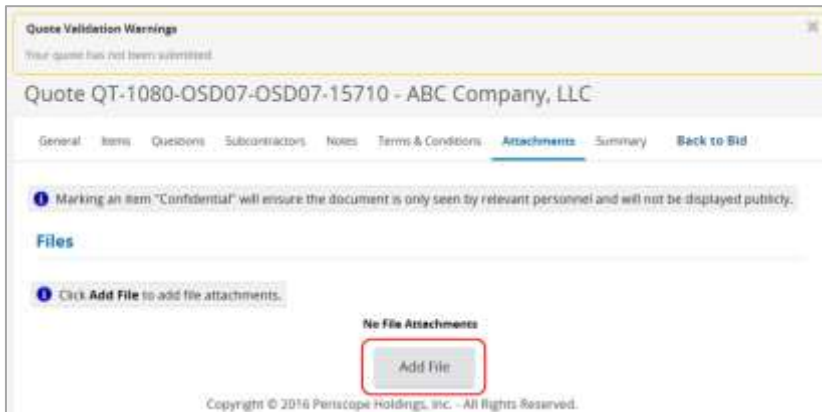
Note: Any files uploaded to the bid by the buyer (such as the RFR) can also be found in the **Terms & Conditions** tab.

Job Aid:

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Quote Validation Warnings
Your quote has not been submitted.

Quote QT-1080-OSD07-OSD07-15710 - ABC Company, LLC

General Items Questions Subcontractors Notes Terms & Conditions **Attachments** Summary Back to Bid

1 Marking an item "Confidential" will ensure the document is only seen by relevant personnel and will not be displayed publicly.

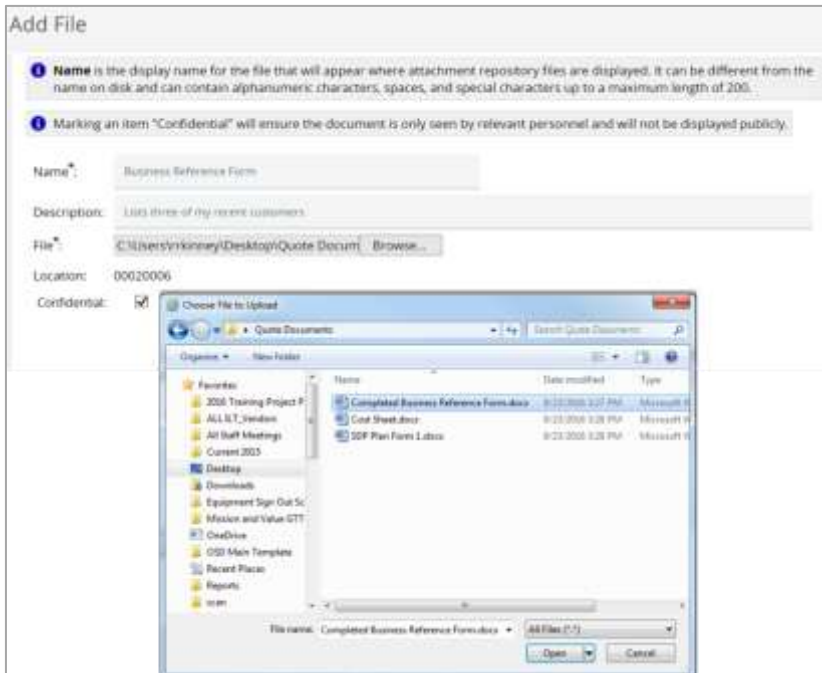
Files

1 Click **Add File** to add file attachments.

No File Attachments

Add File

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Add File

1 **Name** is the display name for the file that will appear where attachment repository files are displayed. It can be different from the name on disk and can contain alphanumeric characters, spaces, and special characters up to a maximum length of 200.

1 Marking an item "Confidential" will ensure the document is only seen by relevant personnel and will not be displayed publicly.

Name*: Business Reference Form

Description: List of three of my recent customers

File*: C:\Users\jrkinnery\Desktop\Quote Docum Browse...

Location: 00020006

Confidential: ☒

Choose File to Upload

Quote Documents

Search Quote Documents

Name	Date modified	Type
Completed Business Reference Form.docx	8/23/2008 3:27 PM	Microsoft Word
Cost Sheet.docx	8/23/2008 3:28 PM	Microsoft Word
SDP Plan Form 1.docx	8/23/2008 3:28 PM	Microsoft Word

The name: Completed Business Reference Form.docx

All Files (*.*)

Open Cancel

Step 11: Attaching Documents to Quote

1. Click on **Add File**.
 2. Click on **Browse** to locate the file you wish to upload.
 3. Once the correct file is located, click **Open** to return to the **Add File** page.
 4. By default, the file's name is populated into the **Name** field. This can be edited to reflect the file name to display when the file is posted. The **Name** field is limited to 200 characters and can contain alphanumeric characters, spaces, and special characters.
 5. The **Description** field is optional and it allows you to briefly describe the attached file.
 6. Check off the **Confidential** box to designate an attachment as confidential.
- Mark only those documents that contain confidential information not subject to the Massachusetts Public Records Law (e.g., those containing your Tax ID, bank account information, etc.) as confidential.
7. Once you are done naming and describing your file, click **Save & Exit** to return to the **Attachments** tab.

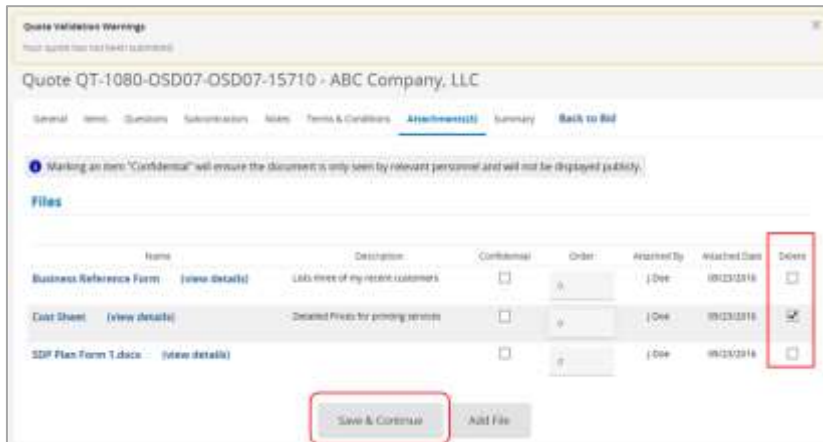
Note: Each document must be added one at a time. To add additional attachments repeat the actions 1-6 within this step.

Job Aid:

Create a Quote in COMMBUYS

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Directions



Quote Validation Warnings

Quote QT-1080-OSD07-OSD07-15710 - ABC Company, LLC

General Items Questions Subcontractors Notes Terms & Conditions **Attachments(3)** Summary Back to Bid

Warning: Marking an item "Confidential" will ensure the document is only seen by relevant personnel and will not be displayed publicly.

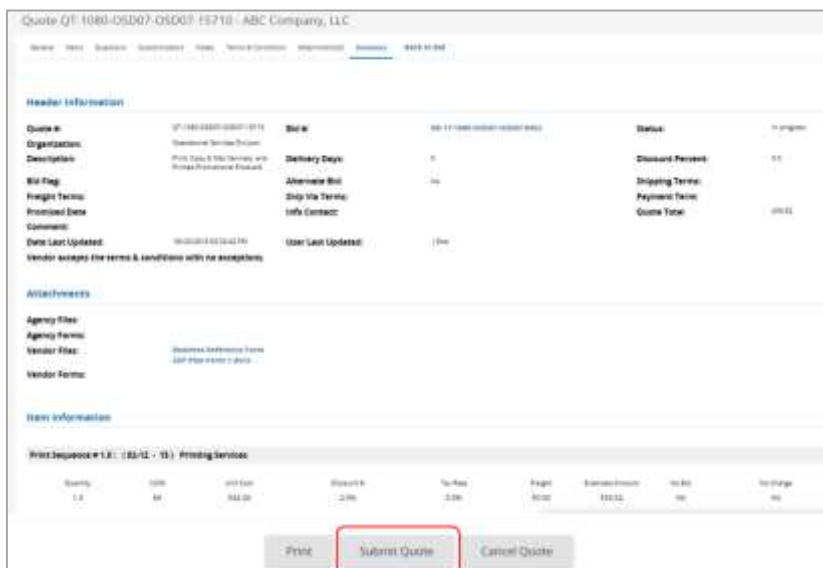
Files

Name	Description	Confidential	Order	Assigned By	Attached Date	Delete
Business Reference Form (view details)	List three of my recent customers	<input type="checkbox"/>	0	J Doe	09/12/2016	<input type="checkbox"/>
Cost Sheet (view details)	Detailed Pricing for printing services	<input type="checkbox"/>	0	J Doe	09/12/2016	<input type="checkbox"/>
SDP Plan Form T.docx (view details)		<input type="checkbox"/>	0	J Doe	09/12/2016	<input type="checkbox"/>

Save & Continue Add File

Step 12: Removing Attachments

1. Check the box in the **Delete** column next to the file you wish to remove.
2. Click **Save & Continue** to remove the file from the attachment list.
3. Click the **Summary** tab to review your quote information.



Quote QT-1080-OSD07-OSD07-15710 - ABC Company, LLC

General Items Questions Subcontractors Notes Terms & Conditions **Summary** Back to Bid

Header Information

Quote #	QT-1080-OSD07-OSD07-15710	Bid #	001-1080-OSD07-OSD07-15710	Status	In progress
Organization	Operational Services Division	Delivery Date	0	Discount Percent	0%
Description	Print, Copy & Mail Service with Storage Production Product	Alternate Bid	No	Shipping Terms	Payment Terms
Kit Flag		Ship Via Terms		Quote Type	
Project Terms		Info Contact			
Payment Date		User Last Updated	J Doe		
Comments					
Date Last Updated	09/12/2016 10:00:00 AM				
Vendor accepts the terms & conditions with no exceptions.					

Attachments

Agency Files: Business Reference Form
Agency Forms: SDP Plan Form T.docx
Vendor Files:
Vendor Forms:

Item Information

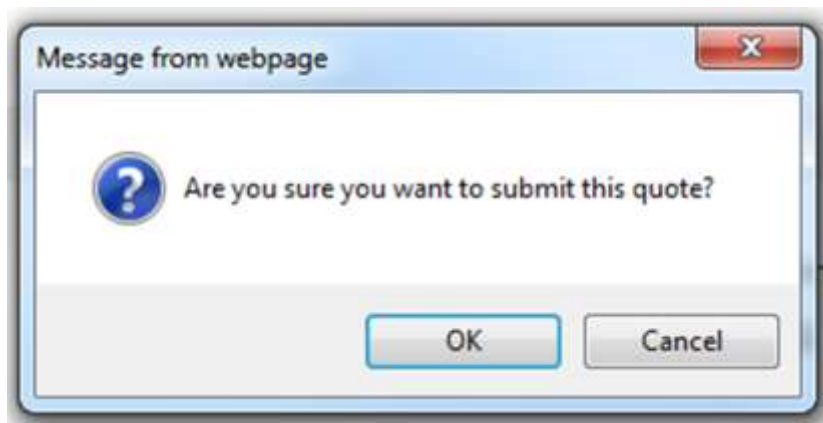
Print Sequence # 1,2: (15-12 - 15) Printing Services

Quantity	Unit	Unit Cost	Discount %	Tax Rate	Price	Subtotal Amount	Net Price	Tax Charge
1.0	EA	100.00	-2.0%	0.0%	\$98.00	\$98.00	\$0.00	\$98.00

Print Submit Quote Cancel Quote

Step 13: Reviewing and Submitting Quotes

1. Review the quote information displayed on the **Summary** tab, and edit as needed by clicking on the tab that requires updating.
2. If no updates are required, click the **Submit Quote** button at the bottom of the page.



Message from webpage

Are you sure you want to submit this quote?

OK Cancel

Step 14: Confirming Quote Submission

1. Click **OK** on the popup message window to proceed with submitting your quote.

Job Aid:

Create a Quote in COMMBUYS

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Directions

Quote QT-1080-OSD07-OSD07-15710 - ABC Company, LLC

General Items Questions Subcontractors Notes Terms & Conditions Attachments(2) **Summary** Back to Bid

Header Information

Quote #: QT-1080-OSD07-OSD07-15710	Bid #: 8D-17-1080-OSD07-OSD07-8435	Status: Submitted
Organization: Operational Services Division	Delivery Days: 0	Discount Percent: 0.0
Description: Print, Copy & Mail Services, and Promoted Promotional Products	Alternate Bid: No	Shipping Terms:
Bid Flag:	Ship Via Terms:	Payment Term:
Freight Terms:	Info Contact:	Quote Total: \$33.52
Promised Date:		
Comment:		
Date Last Updated: 09/29/2016 04:07:54 PM	User Last Updated: J Dye	

Vendor accepts the terms & conditions with no exceptions.

Attachments

Agency Files:

Agency Forms:

Vendor Files: Business Reference Form
SDP Plan Form 1.docx

Item Information

Print Sequence # 1.0 : (82-12 - 15) Printing Services

Quantity	UOM	Unit Cost	Discount %	Tax Rate	Freight	Extended Amount	No Bid	No Change
1.0	EA	\$34.20	2.0%	0.0%	\$0.00	\$33.52	No	No

Print Withdraw Quote

Step 15: Withdrawing Quotes After Submission

1. The **Summary** tab redisplay with an updated status for the quote of **Submitted**.
2. From the **Summary** tab of the quote, you can **withdraw** the quote at any time before the **Bid Opening Date** or before the quote is viewed by the buyer.

For more information on withdrawing quotes, please read the **Withdraw, Reopen, and Resubmit a Quote in COMMBUYS** job aid.